
ABOUT THIS DOCUMENT

This document describes how to install and work with the “Smile IP Contact Center” software product. This document is intended for administrators of the contact center (**CC**) and requires skills in work and administrating in operating system Windows

TERMINOLOGY

The list of terms, which is used in the **Smile IPCC** user’s manual:

Call center – an enterprise or a subdivision of the enterprise, which goal is to effectively service customers by telephone and other electronic communications.

Contact center – hardware and software system designed to manage the flow of phone calls and other electronic communications (fax, email, web, SMS).

Client – a person or an organization, which contacts the Call Center by phone calls, e-mail or other means.

Agent – an employee call center, which deals with customer service.

Supervisor – an agent with extended authority, which monitors and controls the work of agents.

Call - any client request in a call center or address call center to customer (phone call, fax, e-mail, etc.).

Task – set of parameters that describe the service of call and the rules that control this process.

Call Routing - a set of rules which controls the process of selecting tasks for servicing the call.

Distribution of call - a set of rules which controls the process of selecting an agent for servicing the call.

COS - a set of features that allows to distribute the calls based on the features of the customers.

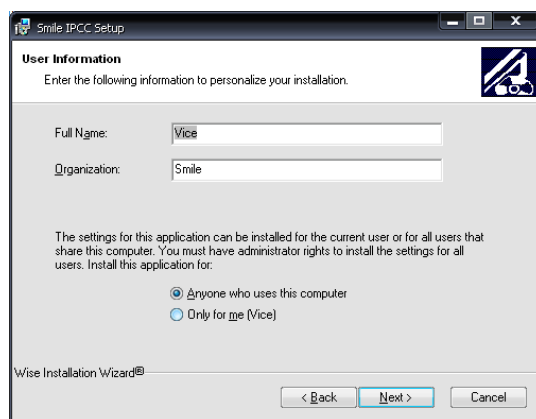
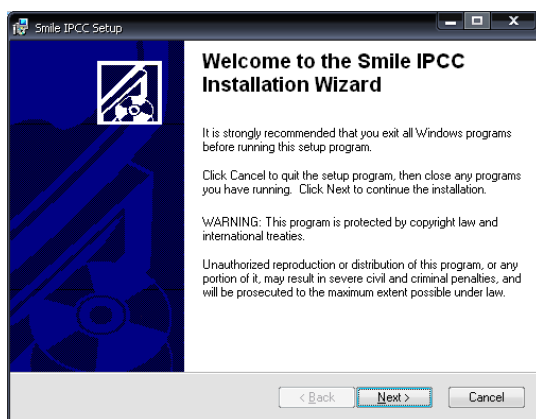
PREFACE

Smile IP Contact Center (**IPCC**) brings the work with clients of your company to a new level. This software allows you to work with almost any scenarios of serving clients, conduct telemarketing events, run company's business processes, and also keep all information about the clients and their requests to your company.

INSTALLATION

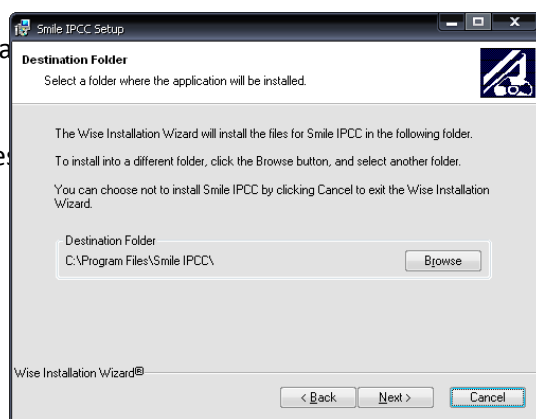
To make a proper installation of Smile IPCC on your PC, please follow the steps below:

1. Launch **smileipcc.exe** application
Follow the instructions that appear

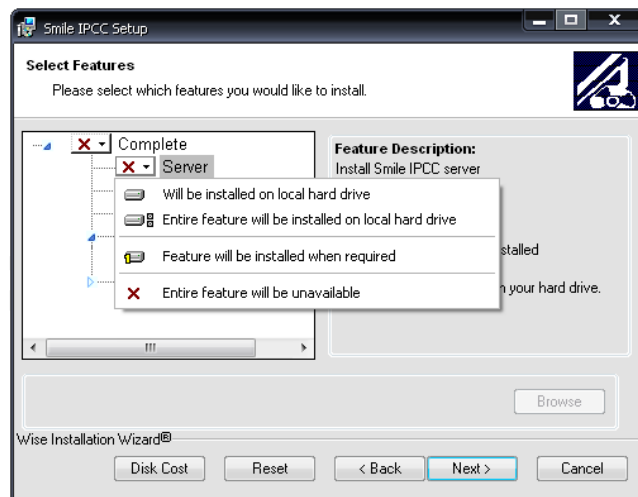


2. Select the destination folder

IMPORTANT If you have already installed this software and you want to install a new copy in the same folder – it's highly recommended to delete all existing files in this folder, which were left after uninstalling the previous version, saving beforehand all necessary service files (configuration server files, algorithms).



3. Select features which you would like to install



Smile IPCC consists of following basic features:

1. **Server** Server part, includes software switchboard, automatic call distribution module, conversation recording module and autodialing module (all modules are optional).
2. **Supervisor** Supervisor's working place. This module allows monitoring and controlling the work of operators in online mode. Also you can listen to conversation recordings and look through CC's work statistic (optional).
3. **Agent** Operator's working place – allows to receive and serve incoming calls
4. **Management Tools** The CC controls and settings. Consists of a graphical management console software switch that allows you to configure routing, gateways, protocols, voice H.323, SIP and boards of computer telephony (Dialogic); and administrator console, manages the work of CC in total (tasks settings, operators settings, customers settings, etc. etc.).
5. **Development Tools** Includes CTI application development tools (**Visual CTI**) and tools for creating forms to work with clients.

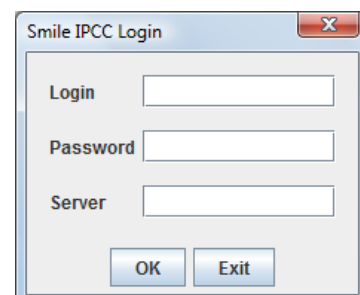
4. After installation reboot your system.

GETTING STARTED

Smile IPCC runs as a service. You can also start server by using a shortcut **Start>Programs>Smile IPCC>Start Server**¹.

Use a shortcut in Start menu to lunch administrator console ² or at desktop³. Enter administrator's login, password, and IP-address of desired server.

IMPORTANT By default
Login -«admin»,
Password and Server left untouched



Pic.1

If the data are correct – Smile IPCC administrator console will appear.

Graphical Administration Console is a set of elements on the left side and tuning these elements on the right, which lets you manage all of **CC**.

GENERAL SETTINGS (THE ROOT ELEMENT)

These settings are made via the root element of the list (with a network name server), 1, you can display the menu by clicking the right mouse button.

CHANGE ADMINISTRATOR PASSWORD

For security purposes, it is desirable to set the administrator password. Select "**Change password**" in the menu of the root element. In the dialog box, enter the old and new password, then press the «**Accept**».

SMILE IPCC SERVICES SETUP

All settings of the system services are made through the element «Services» in root menu.

E-mail setup

- 1) Select «E-mail» option in services setup menu.
- 2) Set inbox preferences:

POP3 server Inbox server address.

Login Account login.

Password Account password.

- 1) Set outgoing mail preferences:

SMTP server Outgoing mail server address.

Admin All crash logs and unsorted mail will be sent to this E-mail. This address also will be used as a reverse for all outgoing mail.

FAX setup

- 1) Select «FAX» option in services setup menu.
- 2) In the "Outgoing" enter the settings for sending faxes

Prefix for routing Added to the numbers which will be sent by fax.

Play greeting Select an audio file to play before sending fax.

Max number of attempts you can set the maximum number of attempts to send a fax

Play a CNG signal Signal, which plays before sending fax.

- 1) The section "**Incoming**" has only one option - "Play a CED sound ». Activate this option to play the signal before receiving a fax.

Dialer setup

Dialer service – outgoing autodial module. Set the following preferences before running this module:

Access to autodial server console Login and password of Dialer administrator.

Number of calls per second Maximum permitted number of simultaneous calls for this module.

Queue setup

Calls queue settings:

Raise process priority every Time, after which process priority raises in queue.

Notify the waiting time not less Minimum playback waiting time in the queue, even if the system's calculated waiting time is less than specified in this parameter.

Task queue settings (offline):

Rise process priority every Time, after which process priority (not associated with calls) raises in queue.

Callback queue settings:

Rise process priority every Time, after which process priority (type «**Callback**») raises in queue.

Recording service setup

You can set the destination folder for conversation recordings in «**Catalog**» category, and their format in «**Format**» category. By default they will be saved in the Smile IPCC root catalog.

NOTE To keep larger amount of recordings longer it's recommended to use compressed DSP Group TrueSpeech format.

Updates setup

Updates service allows to automatically update all computers, which have Smile IPCC components installed. To update your system:

- 1) Select folder, which will be used for updating your system, in «Update catalog».
- 2) Copy in selected folder updated files.

Callback setup

Outbound calls queue settings

Repeat, if number is busy in

Repeat, if number doesn't respond in

Max time in queue

SEARCH

You can use «**Search**» service to find desired system feature (operator, task, etc.), which is located in root menu. Choose the type of the file by typing its name in the parameter "**Search object**" and press the "**Find**".

You can save information in HTML format and print it by pressing the «**Print**» button.

ADDITIONAL SETTINGS

You can set additional status codes operators for temporary absence and logging off the system. To add the code, do the following:

- 1) Press the «**Add**» button in the upper half of the dialog box to add **the reasons for temporary absence** or a lower one - for **reasons of logging out of the system**.
- 2) In appeared left string enter a reason code and its description in the appropriate columns. After inputting press «**Enter**».
- 3) Press the «**Accept**» button to save changes.

CONNECTING TO DATABASE

For a proper work of Smile IPCC you need to connect to database, in which further will be recorded all the information related to the work of the contact center, as well as its statistic.

Right-click on the root element and in the drop-down menu, select **Database**.

Smile IPCC uses two standard types connection to database:

Connection to ODBC source To connect this way – create ODBC source by the means of operation system. In «connection to database» dialogue screen enter data source name, login and password.

Connection via JDBC driver Enter driver name to connect, specific driver URL, name of owner scheme, username and password. Username must be either scheme owner, selected in **dbOwner**, or must have authorization to objects of this scheme.

IMPORTANT We recommend using connection via JDBC driver, because this way is more reliable.

NOTE

Example:

Connection to MySQL database via JDBC source

JDBC Driver

com.mysql.jdbc.Driver

Driver Specific URL

jdbc:mysql://localhost[:port number]/test

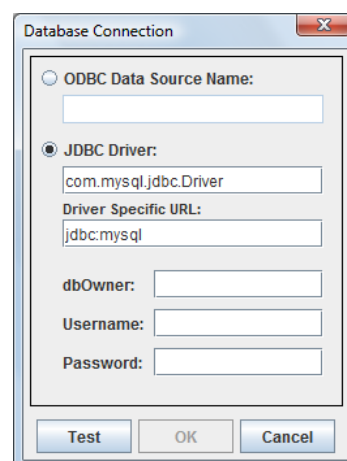
DbOwner

Root

Username

Root

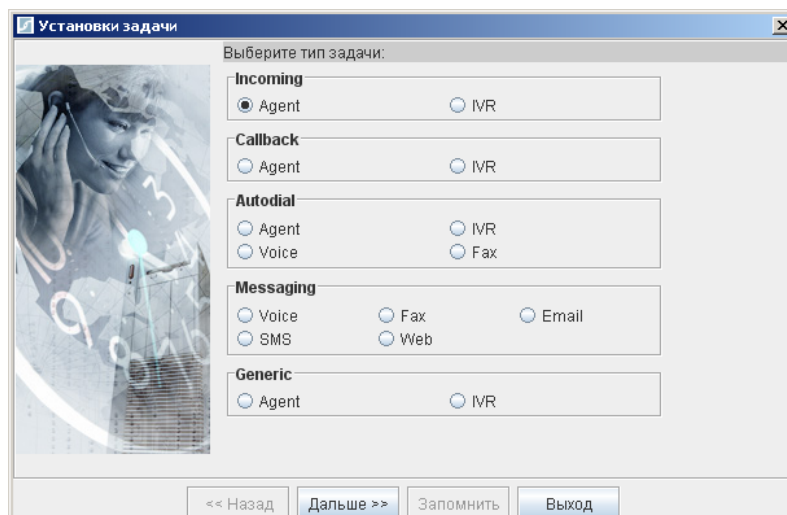
Password



Pic 2.

TASK CREATING

All calls in Smile IPCC are served due to selected rules, which are called **tasks**. Task selecting is made at the time of receiving the call and may depend on such parameters as the source of the call, route of the call, time of the day, the availability of free agents, etc. By the way of servicing the call, tasks can be divided into two main types: a call, which is serviced by an agent (**task agent**), and a call, which is serviced by an automatic script (**task IVR**). During the servicing, the call can be passed from one task to another. For example, at first, a phone call can be serviced by IVR script, and then it can be redirected to agent's task. Agent, accepted the call and performed a certain work, can redirect the call to another task (to another group of agents or IVR script).



Task types in Smile IPCC are:

Incoming

Incoming call

Agent	Call that is distributed to operators
IVR	Call that is serviced by an automatic script. Scripts are created by using the package Smile Visual CTI or using a special programming interface (API)
Callback	Outgoing call, generated by the server in response to customer request
Agent	Call that is distributed to operators
IVR	Call that is serviced by an automatic script
Autodial	Outgoing call, generated by the server on the list of numbers in the automatic mode
Agent	Call that is distributed to operators
IVR	Call that is serviced by an automatic script
Voice	Call with playing an audio message
Fax	Call with fax transfer

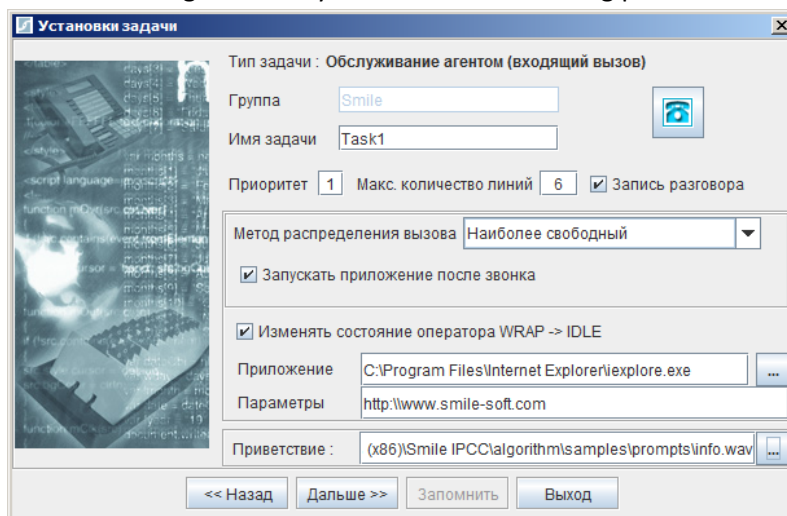
Messaging	Incoming call, served in answering machine mode (offline task)
Voice	Incoming call that is serviced in autoresponder mode. Received message can be passed to the operator, saved in the database or sent via e-mail
Fax	Incoming call, receiving a fax automatically
E-mail	Processing of incoming e-mail
SMS	Processing of cellular network's SMS messages
Generic	The task invoked from the agent's workplace
Agent	Task that is called from the operator's workplace. The Tasks of this type are used to run applications on an operator's computer
IVR	Automatic script that runs on the server on command from the operator's workplace.

To add a group of tasks, right-click on a node "**Tasks**" and select "**Add Group**". In the dialog box, set the name of the group. The remaining data - **contact person, telephone, fax, E-mail, description** - are informative. To create a task, right-click on node and select "**Add Task**".

Follow the instructions in this manual to create various types of tasks.

INCOMING.AGENT

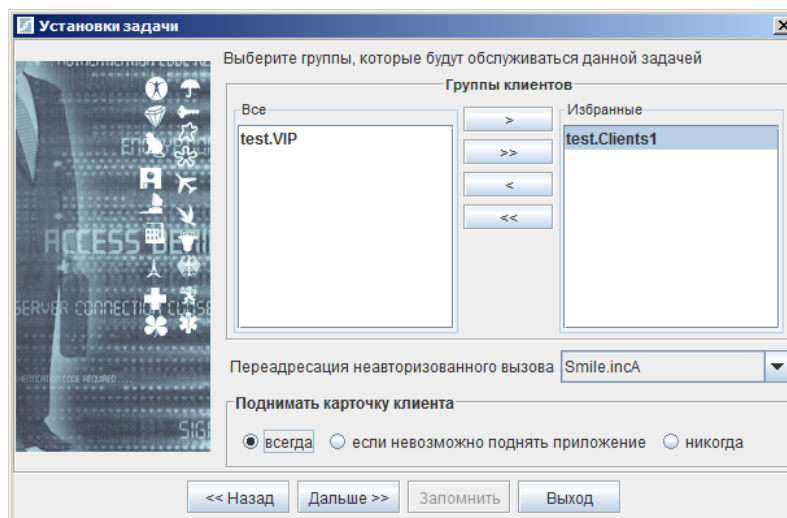
1. Select the appropriate type in the setup wizard box and press «**Next**»
2. In the next task settings window you can set the following parameters:



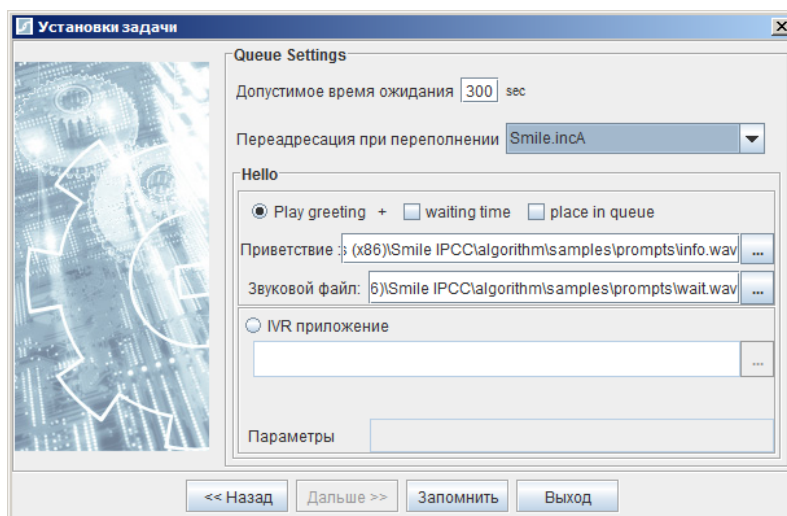
Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	In Smile IPCC it's possible to set an icon for each task or group of tasks that would make it easier to find them in large lists. To do this - press the button with the task icon image and select an image from the provided list
Priority	Operators allocation priority on this task. The higher the priority, the

	faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Conversation recording	Turn on the option to record all calls which are serviced by this task
Method of call distribution	<p>The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way:</p> <ul style="list-style-type: none"> ▪ The most available – selects the operator, which is idle the longest ▪ The least busiest – selects the operator, who was less of all in a servicing state since the beginning of shift ▪ Random select – randomly selects one of free operators ▪ Last served – the call redirects to the operator, who last served it. If the operator is busy, the call is placed in operator's queue ▪ The priority of the last served operator – the call redirects to the operator, who last spoke with a client. If the operator is busy, the call redirects based on «the most available» method ▪ Simultaneously to everybody – the call redirects simultaneously to all available operators. The operator, who answers the first, receives the call ▪ The best answer speed – selects the operator, which answers the incoming call faster than everyone
Run an application after a call	When turned on – an application will lunch on operator's workplace after answering the call and before it – when turned off
Change operator's status WRAP->IDLE	Enabling this option allows you to automatically change the status of the operators after servicing call from a "processing wrap» (WRAP) state to "free" (IDLE)
Application	<p>The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes</p> <p>IMPORTANT The application file must be in the same directory at all workplaces of the operators or in the general file server</p>
Settings	<p>The parameters string passed to the application. For transferring the following special symbols are used:</p> <ul style="list-style-type: none"> * - number, which received a call; \$ - calling number # - client's name (if client was unidentified – the string left blank) ^ - full task name ~ - process id - operator's name, to which the call is redirected
Greeting	Audio file that plays into the line of an incoming call

- Click "Next" after setting up all necessary parameters



- Select **groups of clients** which should be served by this task. To do this, move the necessary groups from the field "All" to the "Favorites." If the task is designed to handle all calls, which are addressed to it - a list of selected groups must be left blank
- In parameter "**unauthorized call forwarding**", select the task to which the call will be redirected if the client does not belong to any of the selected groups
- Select the client's card startup mode when the operator's workplace receives the call in «**Pick up client's card**» parameter
- Click «Next»



- In the parameters of **queue** settings, set the following parameters:

Allowed waiting time

Before directing to the queue the estimate waiting time is calculated. If the calculated value is greater than specified in this parameter - the call won't direct to the queue ("queue overflow")

Redirecting when overflow

From the drop-down list, select a task to which the call will be redirected if the estimated waiting time is higher than allowed. If the task is not selected, then when the queue is overflow, the call is rejected («fast busy»)

Play greeting

Turn on to play the audio file before placing in queue. To set this option, you must configure some additional parameters:

- **Waiting time** – playback of the estimated waiting time after the greeting
- **Place in queue** – playback of client's serial number
- **Greeting** – the path to the audio file, which will be played as a greeting
- **Audio file** - file, which is cyclically played during the whole period of waiting in queue

IVR application

Select the path to the IVR-application, which will be launched when the task is set in queue. You can also set parameters in selected application

String of parameters format:

<parameter>=<value>&<parameter>=<value> &...

Special symbols that can be used in the parameter string for substitution:

- * - called number
- \$ - client's calling number
- # - client's name (if client was unidentified – the string left blank)
- ^ - full task's name
- ~ - global id of the call
- % - estimate waiting time in queue (in seconds)

9. Click «**Apply**»

INCOMING.IVR

1. Select the appropriate type in the tasks settings wizard and click on "**Next**"

2. Configure the task parameters

Task group

Group to which this task belongs (not editable)

Task name

Task name must be unique inside the group. Full task name is following:
<group>.<task>

Task icon

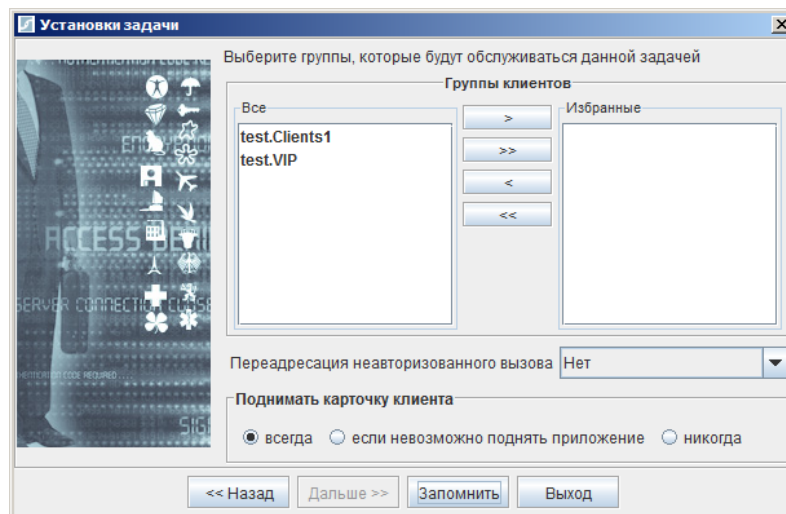
Picture, which symbolizes the task

Priority

Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators

Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Application	File, which runs after receiving incoming call. It could be WAV audio file or IVR-script, created with Smile Visual CTI
Settings	<p>The parameters string passed to the application. For transferring the following special symbols are used:</p> <ul style="list-style-type: none"> * - called number \$ - client's calling number # - client's name (if client was unidentified – the string left blank) ^ - full task's name ~ - global id of the cal % - estimate waiting time in queue (in seconds).
Greeting	Audio file that plays into the line of an incoming call

- After setting of parameters, click "**Next**"



- Select **groups of clients** which should be served by this task. To do this, move the necessary groups from the field "**All**" in the "**Favorites**." If the task is designed to handle all calls addressed to it - a list of selected groups must be left blank.
- In "**Unauthorized call forwarding**" option, select the task to which the call will be redirected if the client does not belong to any of the selected groups.
- elect client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter.
- Click «**Apply**»

CALLBACK.AGENT

1. In the tasks setup wizard select the **callback->Agent** type of task and click «Next»
2. In next window you can set the following parameters:

Task group

Group to which this task belongs (not editable)

Task name

Task name must be unique inside the group. Full task name is following:
<group>.<task>

Task icon

In Smile IPCC it's possible to set an icon for each task or group of tasks that would make it easier to find them in large lists. To do this - press the button with the task icon image and select an image from the provided list

Priority

Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators

Maximum number of lines

Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)

Conversation recording

Turn on the option to record all calls which are serviced by this task

Method of call distribution

The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way:

- **The most available** – selects the operator, which is idle the longest
- **The least busiest** – selects the operator, who was less of all in a servicing state since the beginning of shift
- **Random select** – randomly selects one of free operators
- **Last served** – the call redirects to the operator, who last served it. If the operator is busy, the call is placed in operator's queue
- **The priority of the last served operator** – the call redirects to the operator, who last spoke with a client. If the operator is busy, the call redirects based on «the most available» method

Change operator's status WRAP->IDLE

Enabling this option allows you to automatically change the status of the operators after servicing call from a "processing wrap» (WRAP) state to "free" (IDLE)

Application

The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes

IMPORTANT The application file must be in the same directory at all workplaces of the operators or in the general file server

Settings

The parameters string passed to the application. For transferring the following special symbols are used:

* - called number

\$ - client's calling number

- client's name (if client was unidentified – the string left blank)

^ - full task's name

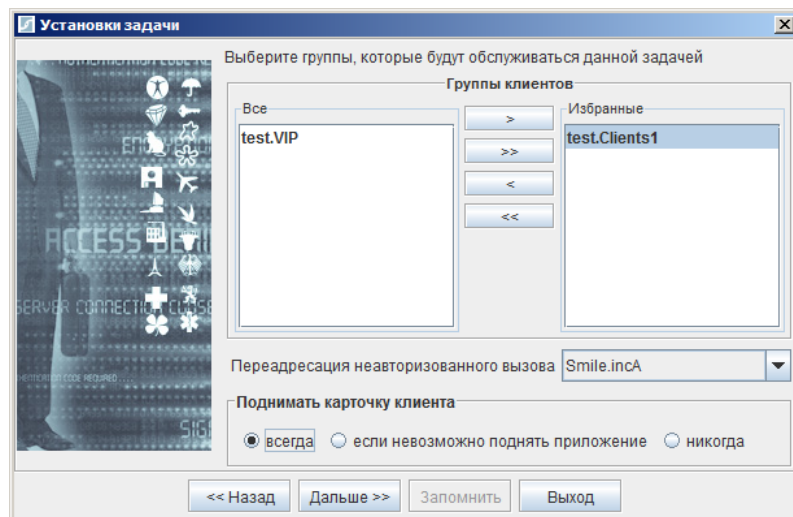
~ - global id of the call

% - estimate waiting time in queue (in seconds)

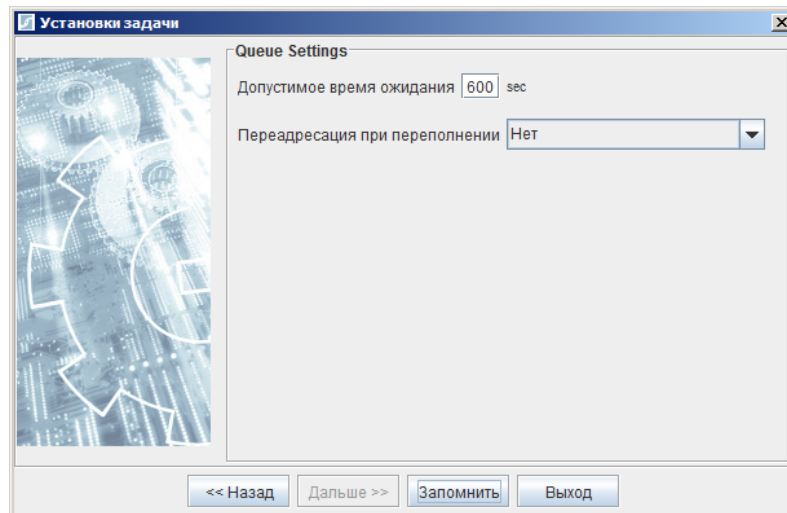
Greeting

Audio file that plays into the line of an incoming call

3. Click «**Next**» after setting all necessary parameters



4. Select **groups of clients** which should be served by this task. To do this, move the necessary groups from the field "All" to the "Favorites." If the task is designed to handle all calls addressed to it - a list of selected groups must be left blank
5. In «**Unauthorized call forwarding**» option select the task to which the call will be redirected in case if the client doesn't belong to any featured group
6. Select client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter
7. Click «**Next**»
8. Set the following **queue** settings:



Allowed waiting time

Maximum waiting time for operator. If the calculated waiting time exceeds those which in this option – the call won't set in queue

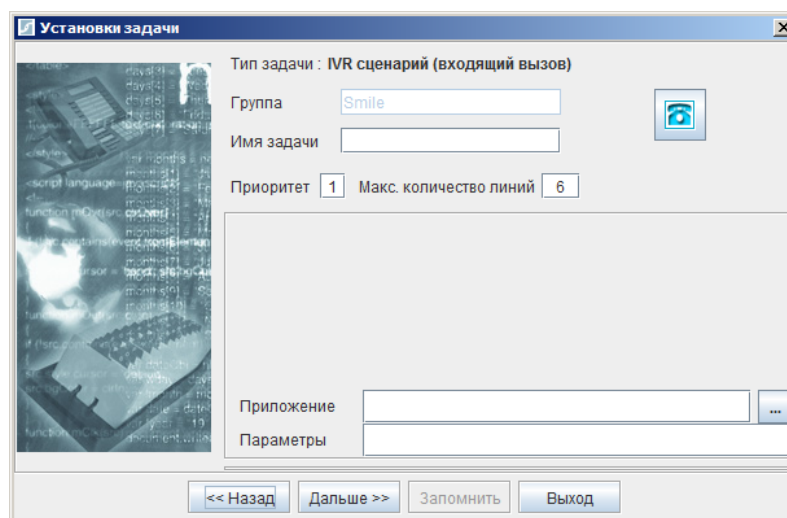
Redirecting when overflow

From the drop-down list, select a task to which the call will be redirected if the estimated waiting time is higher than allowed. If the task is not selected, then when the queue is overflow, the call is rejected («**fast busy**»)

9. After finishing click «**Apply**»

CALLBACK.IVR

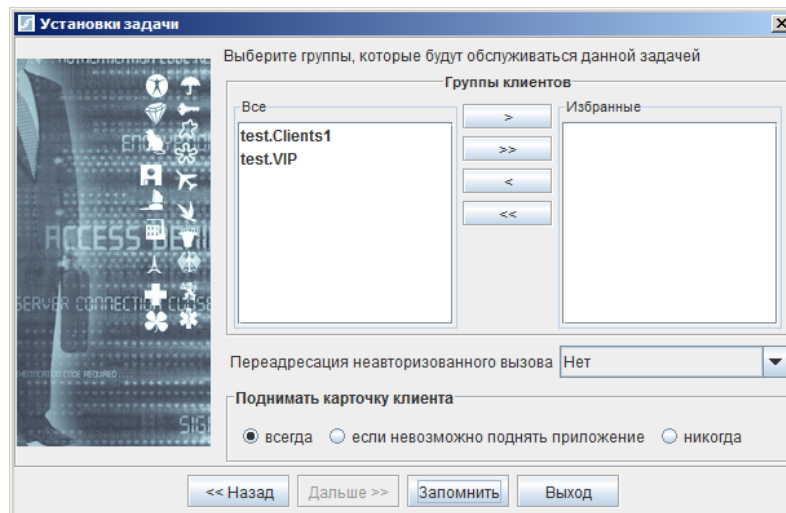
1. In the tasks setup wizard select the **callback->IVR** type of task and click «**Next**»



2. Set task's options:

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	In Smile IPCC it's possible to set an icon for each task or group of tasks that would make it easier to find them in large lists. To do this - press the button with the task icon image and select an image from the provided list
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Application	File, which runs after receiving incoming call. It could be WAV audio file or IVR-script, created with Smile Visual CTI
Settings	The parameters string passed to the application. For transferring the following special symbols are used: * - called number \$ - client's calling number # - client's name (if client was unidentified – the string left blank) ^ - full task's name ~ - global id of the call % - estimate waiting time in queue (in seconds)

3. Click «**Next**» after configuring all necessary settings

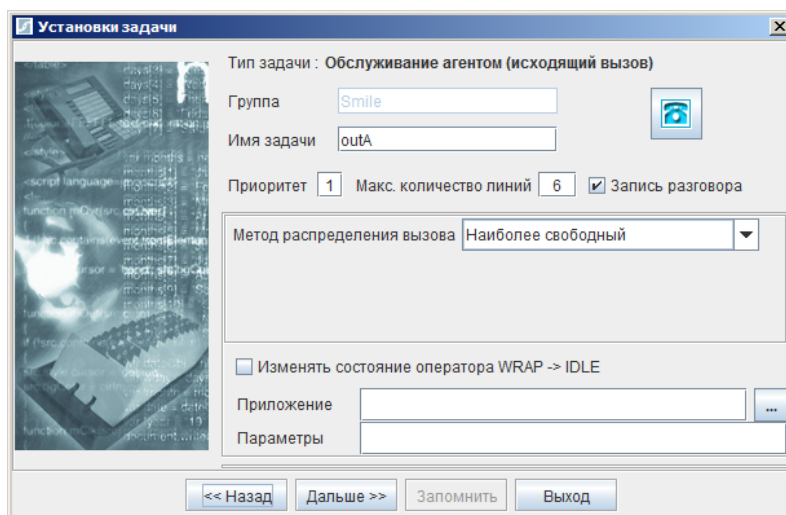


4. Select **groups of clients** which should be served by this task. To do this, move the necessary groups from the field "All" in the "Favorites". If the task is designed to handle all calls addressed to it - a list of selected groups must be left blank

5. In «**Unauthorized call forwarding**» option select the task to which the call will be redirected in case if the client doesn't belong to any featured group
6. Select client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter
7. After finishing click «**Apply**»

AUTODIAL.AGENT

1. In the tasks setup wizard select the **Autodial->Agent** type of task and click «**Next**»



2. In next window you can set the following options:

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	In Smile IPCC it's possible to set an icon for each task or group of tasks that would make it easier to find them in large lists. To do this - press the button with the task icon image and select an image from the provided list
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Conversation recording	Turn on the option to record all calls which are serviced by this task
Method of call distribution	<p>The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way:</p> <ul style="list-style-type: none"> ▪ The most available – selects the operator, which is idle the longest ▪ The least busiest – selects the operator, who was less of all in a servicing state since the beginning of shift ▪ Random select – randomly selects one of free operators

Change operator's status WRAP->IDLE Enabling this option allows you to automatically change the status of the operators after servicing call from a "processing wrap» (WRAP) state to "free" (IDLE)

Application The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes

Settings The parameters string passed to the application. For transferring the following special symbols are used:

\$ - client's calling number

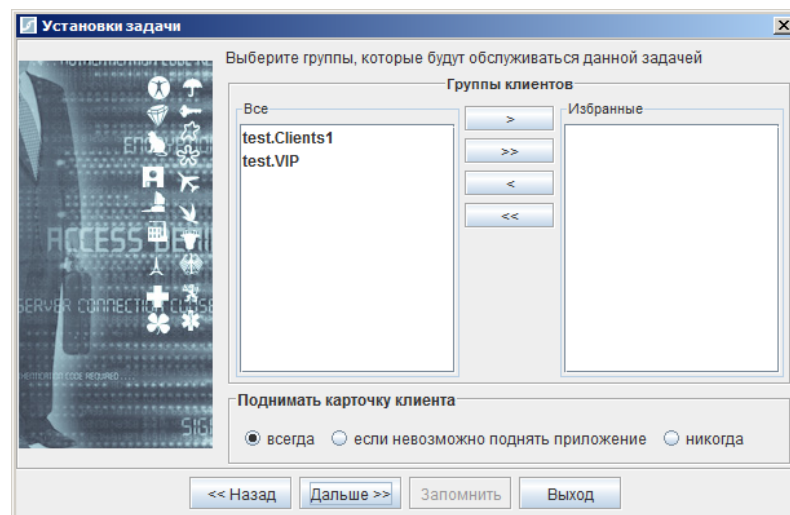
- client's name (if client was unidentified – the string left blank)

^ - full task's name

~ - global id of the call

| - operator's name, to which the call will be redirected

3. Click «**Next**» after configuring all necessary settings

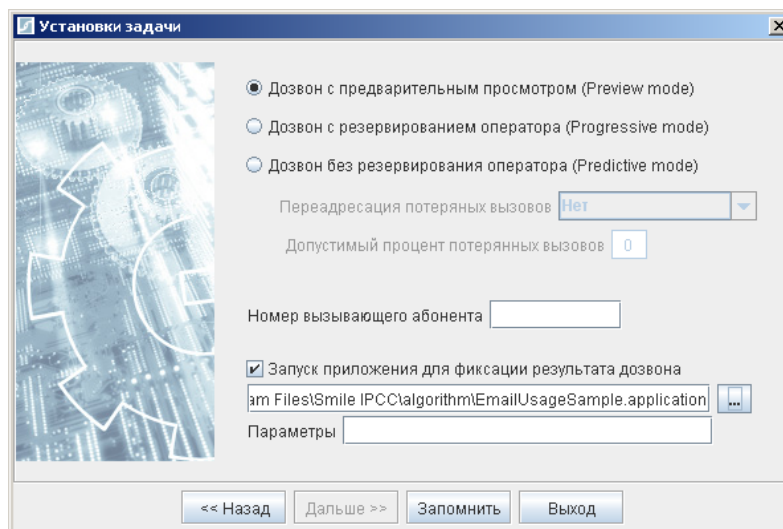


4. Select groups of clients, which will be called by this task. To do this, drag the necessary groups from «**All**» to «**Favorites**»

IMPORTANT This task won't work, if there are no client groups in «**Favorites**» field

5. Select show client's card mode when the call will be receipted on operator's workplace in «**Pick client's card**» option

6. Click «Next»



7. Set outbound dial options for this task:

Dial with preview (Preview mode) Dial mode, in which system requests permission of operator and then, if operator agrees, begins to call to client

Dial with reserving operator (Progressive mode) In this dial mode, before calling client, a free operator is reserved.

Dial without reserving operator (Predictive mode) In this mode system at first makes a successful call to client and then select available operator. Select additional options to work in this mode:
Dropped calls forwarding - if at the time of connection to the client free operator is absent - the call may be forwarded to another task.

The permitted percentage of lost calls - because this mode requires a connection to the client before the operator is found free - calls in which the connection was not held with the operator - are lost. This option sets the permitted percentage of calls for which there was no free operator called number, which is substituted by server when calling

Number of calling client

Launch application to fix the results of autodial Enabling this option allows after the end of each call to run the system for fixing the results. Specify the path to the application that will store the results of task's work and parameters that are passed to the application.

Format of string of parameters:

<parameter>=<value>&<parameter>=<value>&...

Special symbols that can be used in the parameter string for substitution:

* - number, which received a call

\$ - client's calling number

- client's name (if client was unidentified – the string left blank)

^ - full task's name

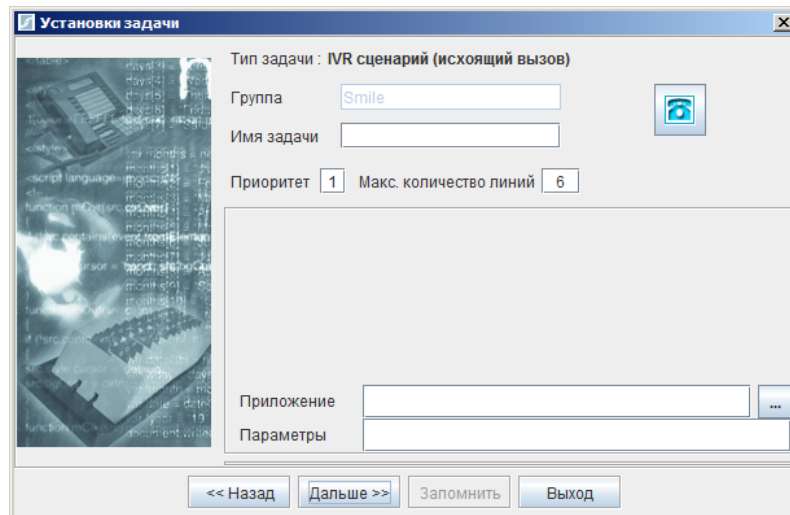
~ - global id of the call

| - operator's name, to which the call will be redirected

8. Click «Apply» to save changes

AUTODIAL.IVR

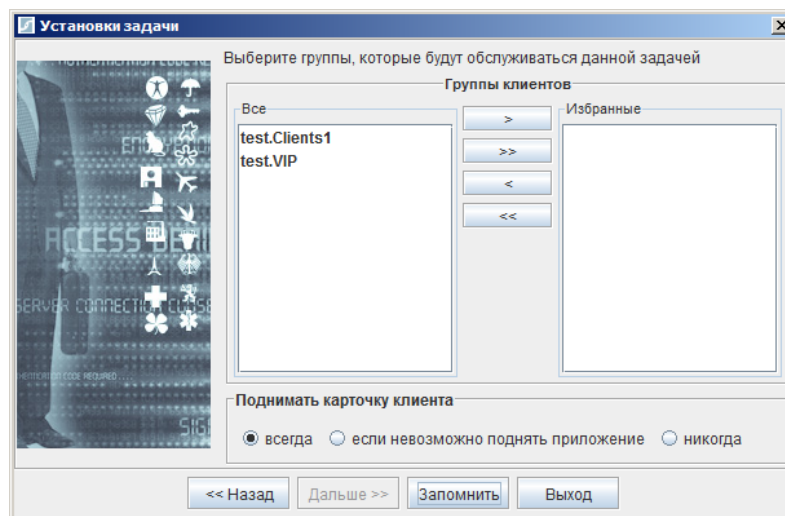
1. Select the appropriate type in the tasks setup wizard and click «**Next**»



2. Configure the task options

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	Picture, which symbolizes the task
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Application	File, which runs after receiving incoming call. It could be WAV audio file or IVR-script, created with Smile Visual CTI
Settings	The parameters string passed to the application. For transferring the following special symbols are used: \$ - client's calling number # - client's name (if client was unidentified – the string left blank) ^ - full task's name ~ - global id of the call

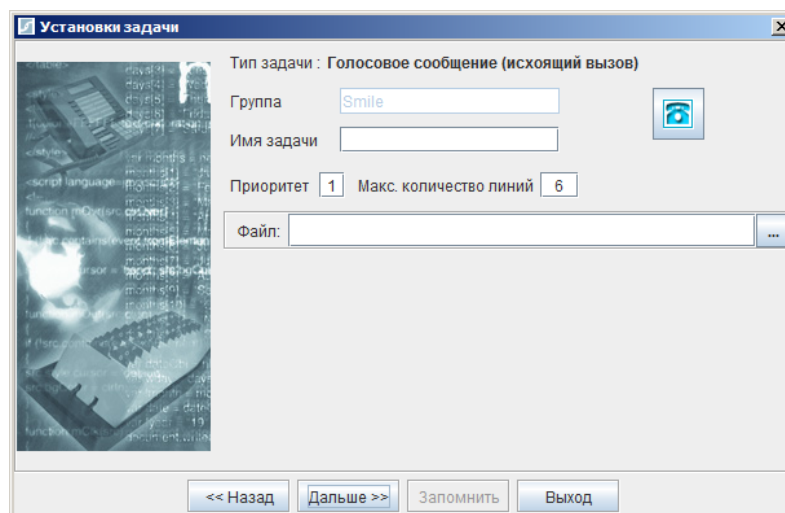
3. Click «**Next**» after all necessary settings are set



4. Select groups of clients, which will be called by this task. To do this, drag the necessary groups from «**All**» to «**Favorites**».
5. Select client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter
6. Click «**Apply**»

AUTODIAL.VOICE

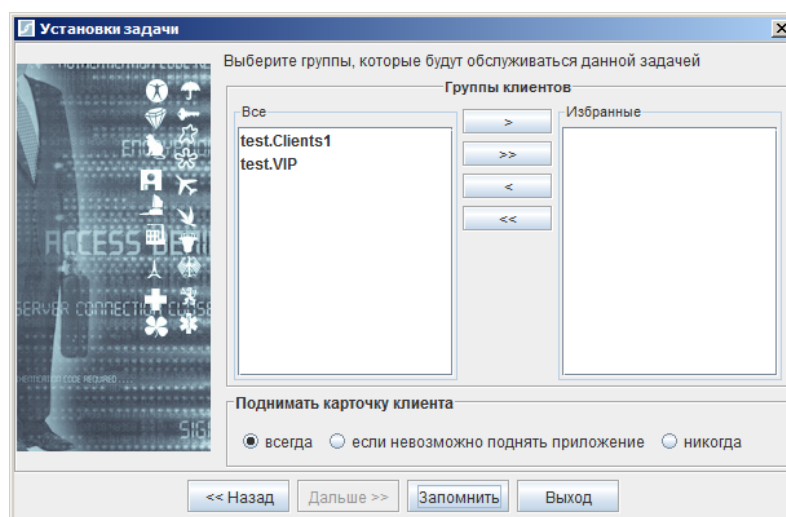
1. Select the appropriate type in the tasks setup wizard and click «**Next**»



2. Configure the task options

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	Picture, which symbolizes the task
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
File	Audio file, which will be played to client while connecting

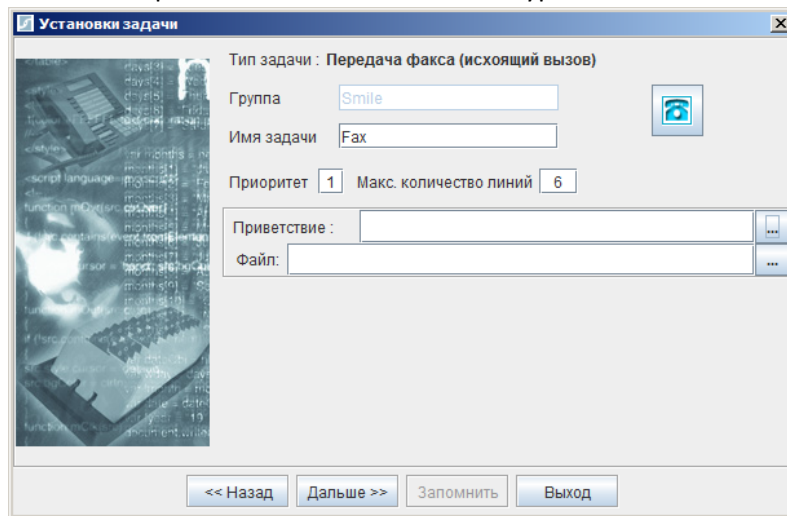
3. Click «Next» after all necessary settings are set



3. Select group of clients, which will be called by this task. To do this, drag the necessary groups from «All» to «Favorites»
4. Select client's card launch mode when the call receipts on operator's workplace in «Pick client's card» parameter
5. Click «Apply»

AUTODIAL.FAX

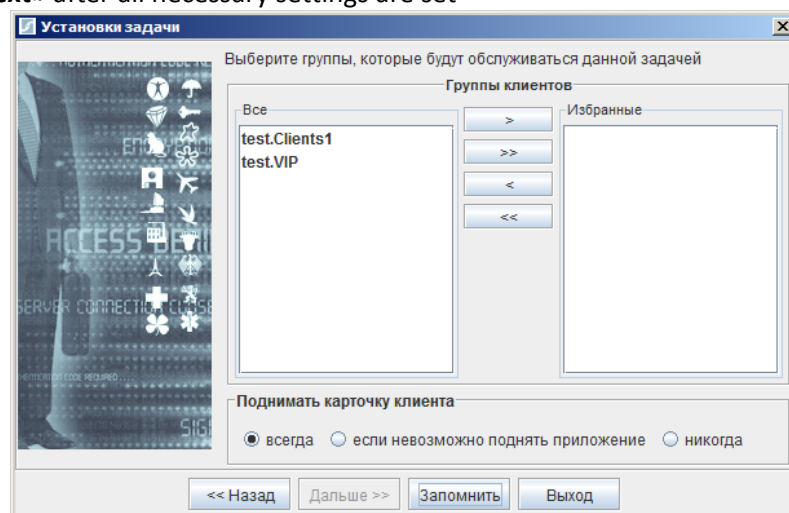
1. In the tasks setup wizard select **Autodial->Fax** type of task and click «Next»



2. Configure the task options

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	Picture, which symbolizes the task
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Greeting	Audio file, which will be played to client while connecting
File	file with fax document
IMPORTANT	File must be in TIFF format to send fax

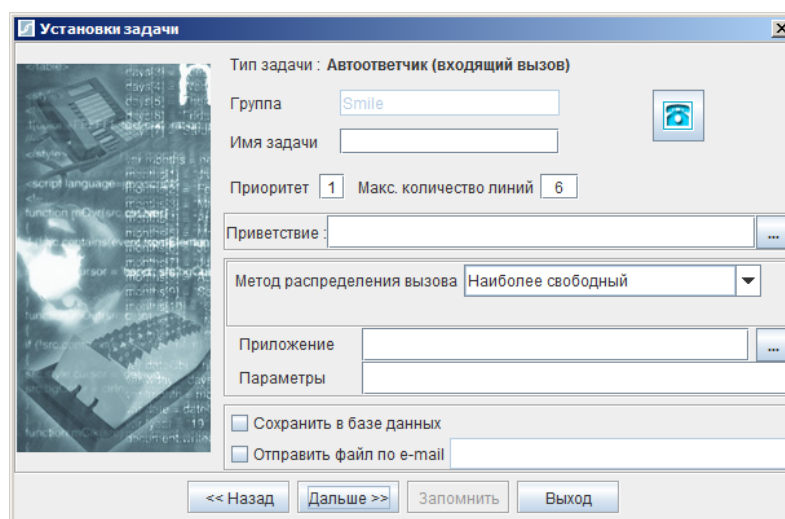
3. Click «Next» after all necessary settings are set



4. Select groups of clients, which will be called by this task. To do this, drag the necessary groups from «**All**» to «**Favorites**».
5. Select client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter
6. Click «**Apply**»

MESSAGING.VOICE

1. In the tasks setup wizard select **Messaging->Voice** type of task and click «**Next**»



2. Configure the task options

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	Picture, which symbolizes the task
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Greeting	audio file, which will be played to client while connecting
Method of call distribution	The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way: <ul style="list-style-type: none"> ▪ The most available – selects the operator, which is idle the longest ▪ The least busiest – selects the operator, who was less of all in a servicing state since the beginning of shift ▪ Random select – randomly selects one of free operators

- **Last served** – the call redirects to the operator, who last served it. If the operator is busy, the call is placed in operator's queue
- **The priority of the last served operator** – the call redirects to the operator, who last spoke with a client. If the operator is busy, the call redirects based on «**the most available**» method
- **None** – the call is not served (the message is recorded into database or sent via e-mail)

Application

The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes.

IMPORTANT The application file must be in the same directory at all workplaces of the operators or in the general file server

Settings

The parameters string passed to the application. For transferring the following special symbols are used:

\$ - client's calling number

- client's name (if client was unidentified – the string left blank)

^ - full task's name

~ - global id of the call

| - operator's name, to which the call will be redirected

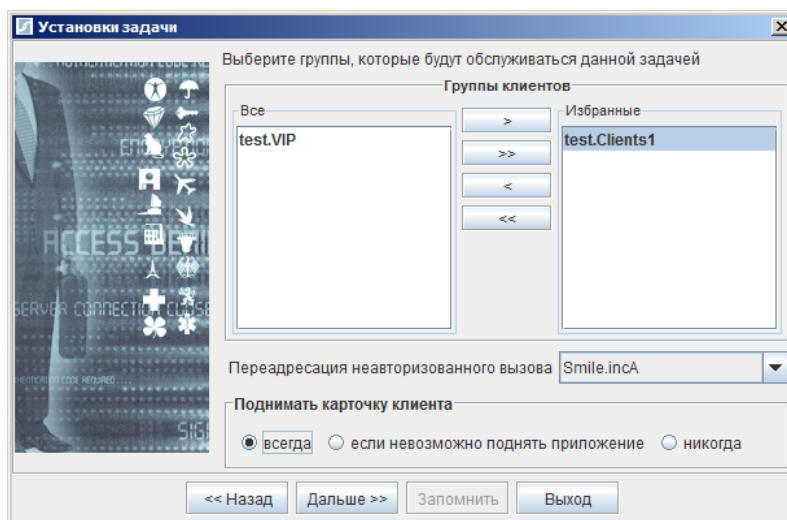
Save in database

Client's recorded message is saved in database

Send file via e-mail

Enter e-mail to which you want to send recorded files

3. Click «**Next**» after all necessary settings are set

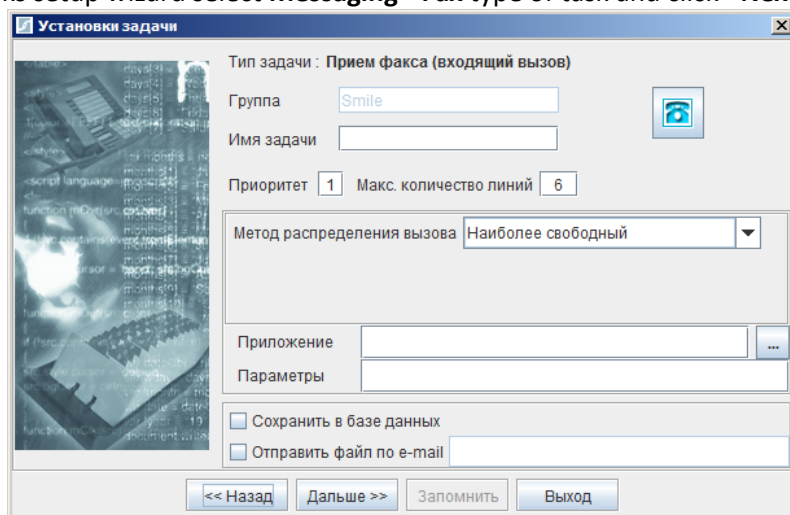


4. Select **groups of clients** which should be served by this task. To do this, move the necessary groups from the field "All" in the "Favorites". If the task is designed to handle all calls addressed to it - a list of selected groups must be left blank
5. In «**Unauthorized call forwarding**» option select the task to which the call will be redirected in case if the client doesn't belong to any featured group

6. Select client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter
7. Click «**Apply**»

MESSAGING.FAX

1. In the tasks setup wizard select **Messaging->Fax** type of task and click «**Next**»

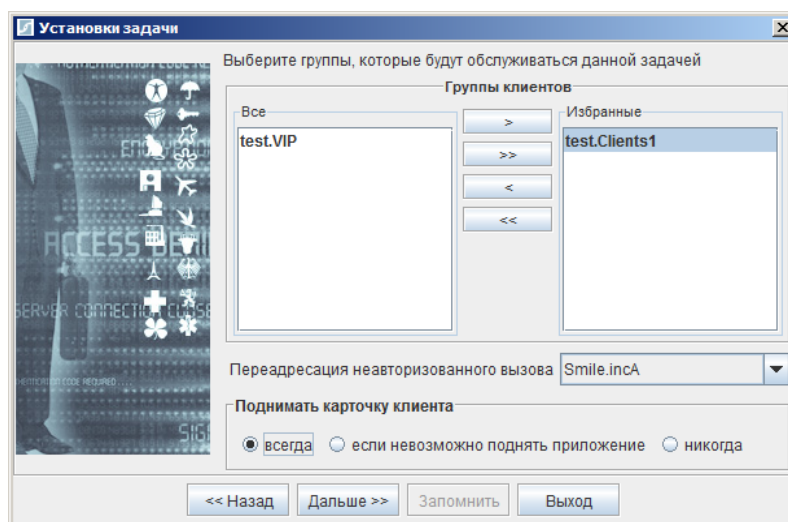


2. Configure the task options

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	Picture, which symbolizes the task
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Greeting	audio file, which will be played to client while connecting
Method of call distribution	<p>The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way:</p> <ul style="list-style-type: none"> ▪ The most available – selects the operator, which is idle the longest ▪ The least busiest – selects the operator, who was less of all in a servicing state since the beginning of shift ▪ Random select – randomly selects one of free operators ▪ Last served – the call redirects to the operator, who last served it. If the operator is busy, the call is placed in operator's queue ▪ The priority of the last served operator – the call redirects to the operator, who last spoke with a client. If the operator is busy, the call redirects based on «the most available» method ▪ None – the call is not served (the message is recorded into database or sent via e-mail)

Application	<p>The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes.</p> <p>IMPORTANT The application file must be in the same directory at all workplaces of the operators or in the general file server</p>
Settings	<p>The parameters string passed to the application. For transferring the following special symbols are used:</p> <p>\$ - client's calling number # - client's name (if client was unidentified – the string left blank) ^ - full task's name ~ - global id of the call - operator's name, to which the call will be redirected</p>
Save in database	Client's fax message is saved in database
Send file via e-mail	Enter e-mail to which you want to send recorded files

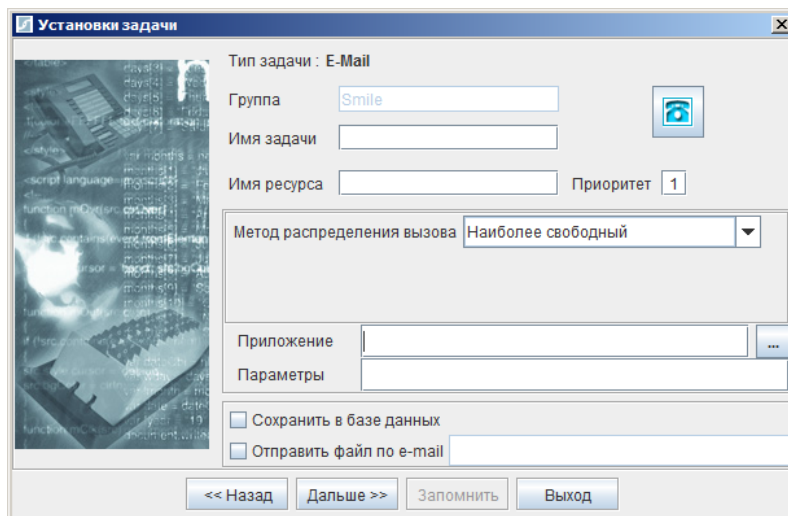
- Click «**Next**» after all necessary settings are set



- Select **groups of clients** which should be served by this task. To do this, move the necessary groups from the field "All" in the "Favorites". If the task is designed to handle all calls addressed to it - a list of selected groups must be left blank
- In «**Unauthorized call forwarding**» option select the task to which the call will be redirected in case if the client doesn't belong to any featured group
- Select client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter
- Click «**Apply**»

MESSAGING.E-MAIL

1. In the tasks setup wizard select **Messaging->E-mail** type of task and click «**Next**»



2. Configure the task options

Task group

Group to which this task belongs (not editable)

Task name

Task name must be unique inside the group. Full task name is following:
<group>.<task>

Task icon

Picture, which symbolizes the task

Source name

username (e-mail box), which receives e-mails for this task

Priority

Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators

Maximum number of lines

Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)

Greeting

audio file, which will be played to client while connecting

Method of call distribution

The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way:

- **The most available** – selects the operator, which is idle the longest
- **The least busiest** – selects the operator, who was less of all in a servicing state since the beginning of shift
- **Random select** – randomly selects one of free operators
- **Last served** – the call redirects to the operator, who last served it. If the operator is busy, the call is placed in operator's queue
- **The priority of the last served operator** – the call redirects to the operator, who last spoke with a client. If the operator is busy, the call redirects based on «**the most available**» method
- **None** – the call is not served (the message is recorded into database or sent via e-mail)

Application

The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes.

IMPORTANT The application file must be in the same directory at all workplaces of the operators or in the general file server

Settings

The parameters string passed to the application. For transferring the following special symbols are used:

* - number, which received a call

\$ - client's calling number

- client's name (if client was unidentified – the string left blank)

^ - full task's name

~ - global id of the call

| - operator's name, to which the call will be redirected

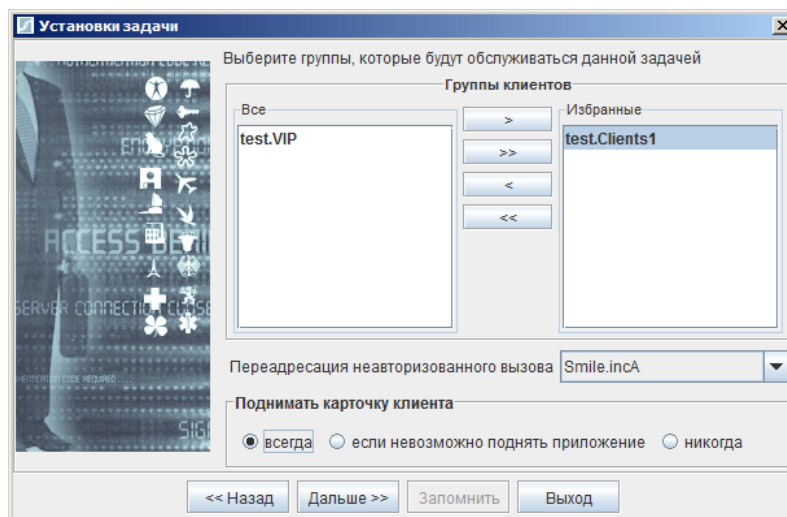
Save in database

Client's message is saved in database

Send file via e-mail

Enter e-mail to which you want to send recorded files

3. Click «**Next**» after all necessary settings are set



4. Select **groups of clients** which should be served by this task. To do this, move the necessary groups from the field "All" in the "Favorites". If the task is designed to handle all calls addressed to it - a list of selected groups must be left blank
5. In «**Unauthorized call forwarding**» option select the task to which the call will be redirected in case if the client doesn't belong to any featured group
6. Select client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter
7. Click «**Apply**»

MESSAGING.SMS

1. Select in the tasks setup wizard **Messaging->SMS** type of task and click «**Next**»

2. Configure the task options

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	Picture, which symbolizes the task
Source name	Username (e-mail box), which receives e-mails for this task
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Greeting	audio file, which will be played to client while connecting
Method of call distribution	Agent receives the call as a text message. The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way: <ul style="list-style-type: none">▪ The most available – selects the operator, which is idle the longest▪ The least busiest – selects the operator, who was less of all in a servicing state since the beginning of shift▪ Random select – randomly selects one of free operators▪ Last served – the call redirects to the operator, who last served it. If the operator is busy, the call is placed in operator's queue▪ The priority of the last served operator – the call redirects to the operator, who last spoke with a client. If the operator is busy, the call redirects based on «the most available» method▪ None – the call is not served (the message is recorded into database or sent via e-mail)

Application

The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes

IMPORTANT The application file must be in the same directory at all workplaces of the operators or in the general file server

Settings

The parameters string passed to the application. For transferring the following special symbols are used:

* - number, which received a call

\$ - client's calling number

- client's name (if client was unidentified – the string left blank)

^ - full task's name

~ - global id of the call

| - operator's name, to which the call will be redirected

%% - text message

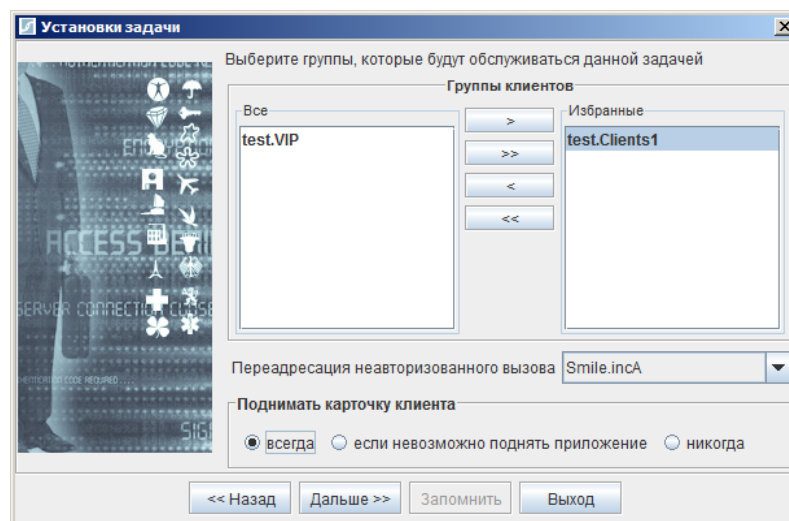
Save in database

The message is saved in database

Send via e-mail

The message is sending to the specified number

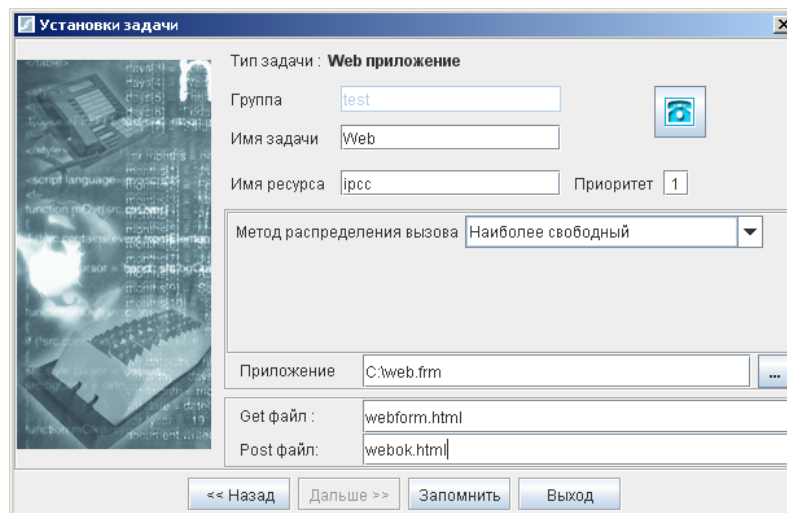
3. Click «**Next**» after configuring all necessary settings



4. Select **groups of clients** which should be served by this task. To do this, move the necessary groups from the field "All" in the "Favorites". If the task is designed to handle all calls addressed to it - a list of selected groups must be left blank
5. In «**Unauthorized call forwarding**» option select the task to which the call will be redirected in case if the client doesn't belong to any featured group.
6. Select client's card launch mode when the call receipts on operator's workplace in «**Pick client's card**» parameter
7. Click «**Apply**»

MESSAGING.WEB

1. Select in the tasks setup wizard **Messaging->Web** type of task and click «Next»



2. Configure the task options

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	Picture, which symbolizes the task
Source name	Username (email box), which receives e-mails for this task
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Maximum number of lines	Number of simultaneously served calls by a set of rules for this task. If at the time of receiving the call number of serviced calls matches to the parameter - the call is ignored («fast busy»)
Greeting	Audio file, which will be played to client while connecting
Method of call distribution	Agent receives the call as a text message. The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way: The most available – selects the operator, which is idle the longest The least busiest – selects the operator, who was less of all in a servicing state since the beginning of shift Random select – randomly selects one of free operators
Application	The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes IMPORTANT The application file must be in the same directory at all workplaces of the operators or in the general file server
Settings	The parameters string passed to the application. For transferring the following special symbols are used:

* - number, which received a call
\$ - client's calling number
- client's name (if client was unidentified – the string left blank)
^ - full task's name
~ - global id of the call
| - operator's name, to which the call will be redirected
%% - text message

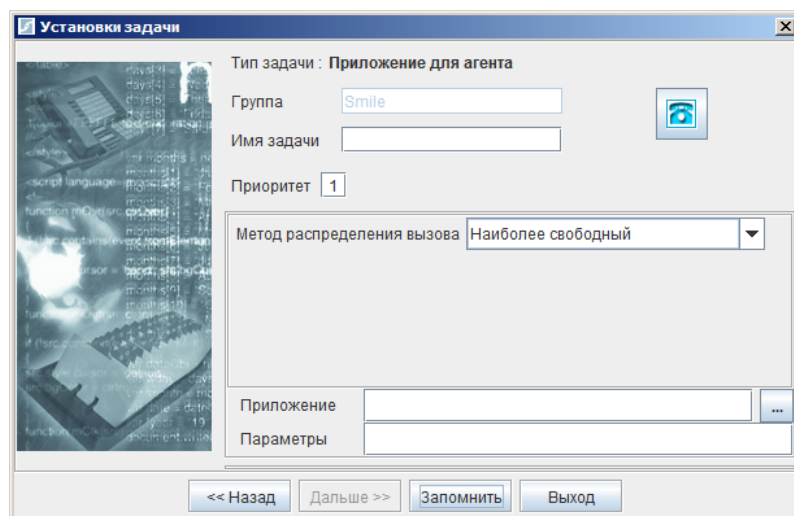
Get file html file with a form for filling data

Post file html file with reply on filled form

3. Click «**Apply**»

GENERIC.AGENT

1. Select in the tasks setup wizard **Generic->Agent** type of task and click «**Next**»



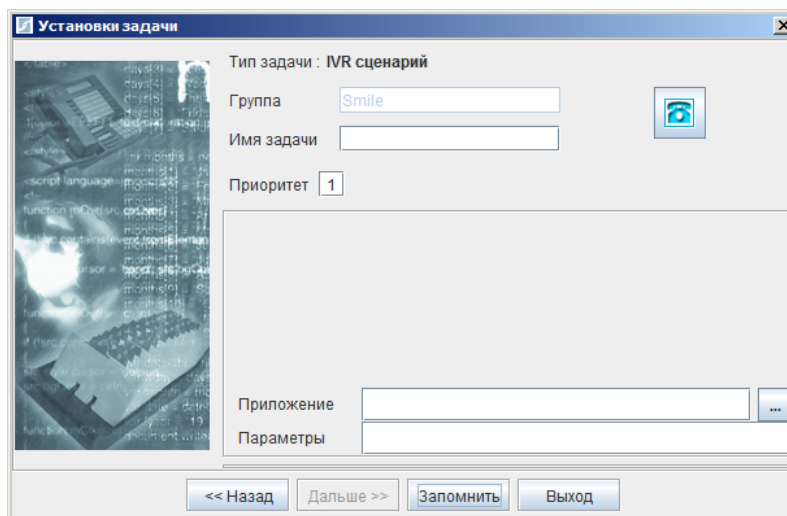
2. Configure the task options

Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	In Smile IPCC it's possible to set an icon for each task or group of tasks that would make it easier to find them in large lists. To do this - press the button with the task icon image and select an image from the provided list
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators.
Method of call distribution	Agent receives the call as a text message. The distribution of the call is made to the available operator, which has the highest priority for the given task. If the priorities of operators are equal, the choice between them is carried out in the following way: <ul style="list-style-type: none">▪ The most available – selects the operator, which is idle the longest▪ The least busiest – selects the operator, who was less of all in a servicing state since the beginning of shift▪ Random select – randomly selects one of free operators
Application	The direct path to the application (file with extension .exe, .bat, .frm, .application), which starts at the workplace of the operator when a call comes IMPORTANT The application file must be in the same directory at all workplaces of the operators or in the general file server
Settings	The parameters string passed to the application. For transferring the following special symbols are used: ^ - full task's name - operator's name, to which the call will be redirected

3. Click «**Apply**»

GENERIC.IVR

1. Select in the tasks setup wizard **Generic->IVR** type of task and click «**Next**»



2. Configure the task options

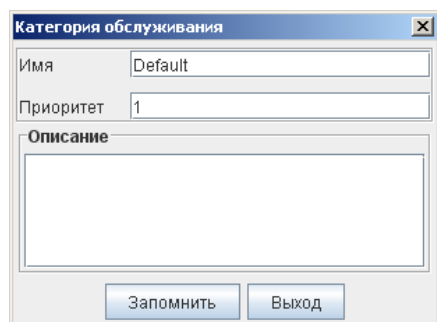
Task group	Group to which this task belongs (not editable)
Task name	Task name must be unique inside the group. Full task name is following: <group>.<task>
Task icon	In Smile IPCC it's possible to set an icon for each task or group of tasks that would make it easier to find them in large lists. To do this - press the button with the task icon image and select an image from the provided list
Priority	Operators allocation priority on this task. The higher the priority, the faster it will be distributed to operators
Application	File, which runs after receiving incoming call. It could be WAV audio file or IVR-script, created with Smile Visual CTI
Settings	The parameters string passed to the application. For transferring the following special symbols are used: ^ - full task's name

3. Click «**Apply**»

CATEGORIES

COS allow distributing calls to certain agents, depending on the calling client. Each group of clients can be assigned to a specific set of categories. Also, a set of categories are assigned to each agent. Calls from clients of certain group are allocated only to those agents who have at least one matching category. The priority of agent on this call is defined on matching category (with a few matching categories - a category with the highest priority is accounted).

To create a category, click the right mouse button on a node "**Categories**" and select "**Add**". In the editing window the name and priority of categories must be specified.



Max amount of categories – 32. Priority – any integer number (the higher the number—the higher the priority).

CLIENTS

Personalized client service is one of the important features of contact center. Client information can be found in one or several different databases. Each client can have a set of features that make it identifiable (phone number, e-mail address, password, etc.) and classify (importance, language, preferences, etc.). Client identification may be performed automatically (when a call comes in), manually (the customer enters a PIN code) or by an agent, who accepted the call. The classification allows to group for servicing clients by various tasks. You can create groups of clients on different classification criteria. For example, a group of clients on a territorial basis, a group of VIP, a group of English-speaking customers, etc. Groups are also used to form lists of outgoing calls in the telemarketers' tasks.

Contact center can identify the clients by telephone number, and any other information stored in the database. A set of data representing information about the client is given with "**Identification card**".

In the **ID card's** field list can include any information that is necessary for the operator to service the task. The form of ID card can be run on the operator's workplace, when receiving a call. If the client is not identified automatically (by phone number), the operator can query on any other parameter of identification card.

To connect the database, click the right mouse button on «**Clients**» and select «**Add data source**». In appeared window enter the settings for connecting to database:

Connection to ODBC source to connect this way – create ODBC source by the means of operation system. In «connection to database» dialogue screen enter data source name, login and password.

Connection via Enter driver name to connect, specific driver URL, name of JDBC driver owner scheme, username and password. Username must be either scheme owner, selected in dbOwner, or must authorization to objects of this scheme.

IMPORTANT We recommend using connection via JDBC driver, because this way is more reliable

NOTE Example
Connection to **MySQL** database via JDBC source:

JDBC Driver
com.mysql.jdbc.Driver
Driver Specific URL
jdbc:mysql://localhost[:port number]/test
DbOwner
Root
Username
Root
Password

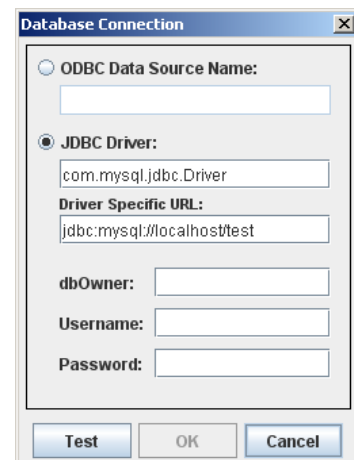
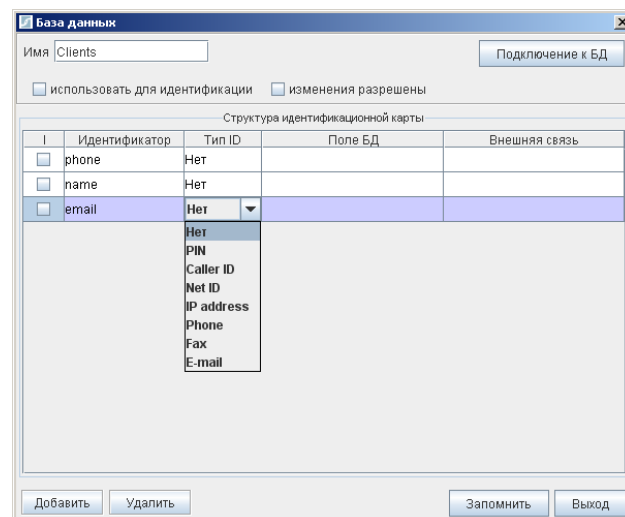


Рис 2.

To test the connection, click «**Test**». If the connection was successful – click «**OK**».

Once you are connected to a database, a window will appear, in which you need to assign compliance of identification card fields to database tables.



Follow these instructions to configure the data source:

1. Enter name for data source.
2. Check the box "Use for authentication" for the system being able to search through the database to identify incoming calls.

3. Box «**Changes allowed**» you to add entries and modify the values of database fields by means of identification forms.
4. The choice of string in the first column («I») specifies a unique identifier that is used as a unique "client name" in the system.
5. Enter the first characters of the name of the table from which you must choose the data in the column "DB field." In the drop-down fields of the database tables - select the appropriate field. The column "External link" is used to organize links to tables on external links, which are used in sampling.
6. In «**Type ID**» column you can set a type of identifier:
 - **PIN** - identification by personal customer number;
 - **Caller ID** – phone number, by which the system can automatically identify client when receiving a call;
 - **IP address** - identification by customer's IP address;
 - **Phone** – the ID value is the phone number, which can also be used for an outgoing call;
 - **Fax** – fax number;
 - **E-mail** – e-mail address;
 - **Task ID** – identification by the task name;
 - **Agent ID** - identification by agent's name.

IMPORTANT To make outgoing calls on a group of clients you must choose in one of identifiers

Type ID – Phone.

7. To add or remove ID - use the buttons at the bottom left of the dialog box.
8. To save group settings– click «**Apply**».

Once the data source is specified, you must create a **client group**. To create a group, select in the node a **data source name**, right click and select "New Group" from the dropdown menu.

To create a client group, set the following settings:

Group name	Name of group of clients
Use when identifying	Check the box for the system being able to search through the database when identifying incoming calls
Criteria	In this box you can add criteria using SQL clauses
All entries	Selects from the database all the records that meet the selection condition
Amount of entries	Set the number of records that you want to select from the database
COS	Select the category to which this group of customers will belong to

Click «**Apply**»

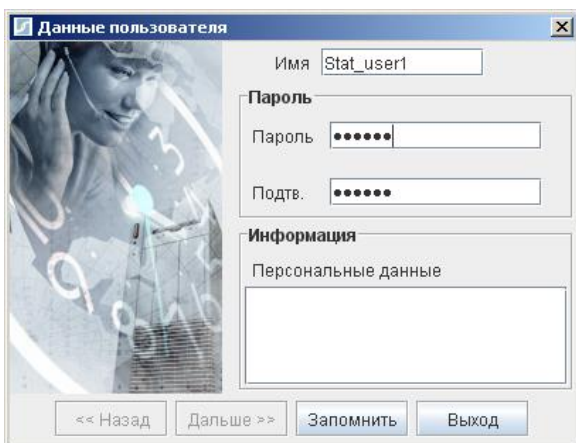
USERS

One of the most important contact center modules - statistics and record conversations. In Smile IPCC to work with these modules, there are special accounts - "users". For each account are allocated rights to view the statistics and listening to records of conversations, both on tasks and operators. In contrast to the supervisors - users can only view the chronological charts. These accounts are necessary to control the performance of various tasks of contact center. You can assign rights to view the statistics for each task group, or to different employees from different departments, which would monitor the implementation of tasks which are assigned to them and report the work.

Users can be divided into groups. To create a group of users, right click on a "**Community**" node and select "**Create a user group**".

To create a user, right click on the group in which you want to create an account and click "**Create User**".

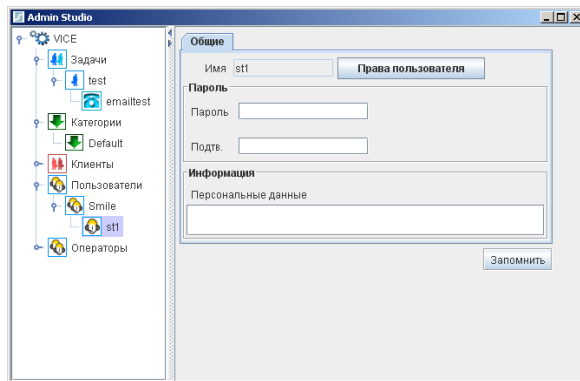
In the dialog box you can set the following settings:



1. Username
2. Password
3. Personal data (this box contains only informative data)

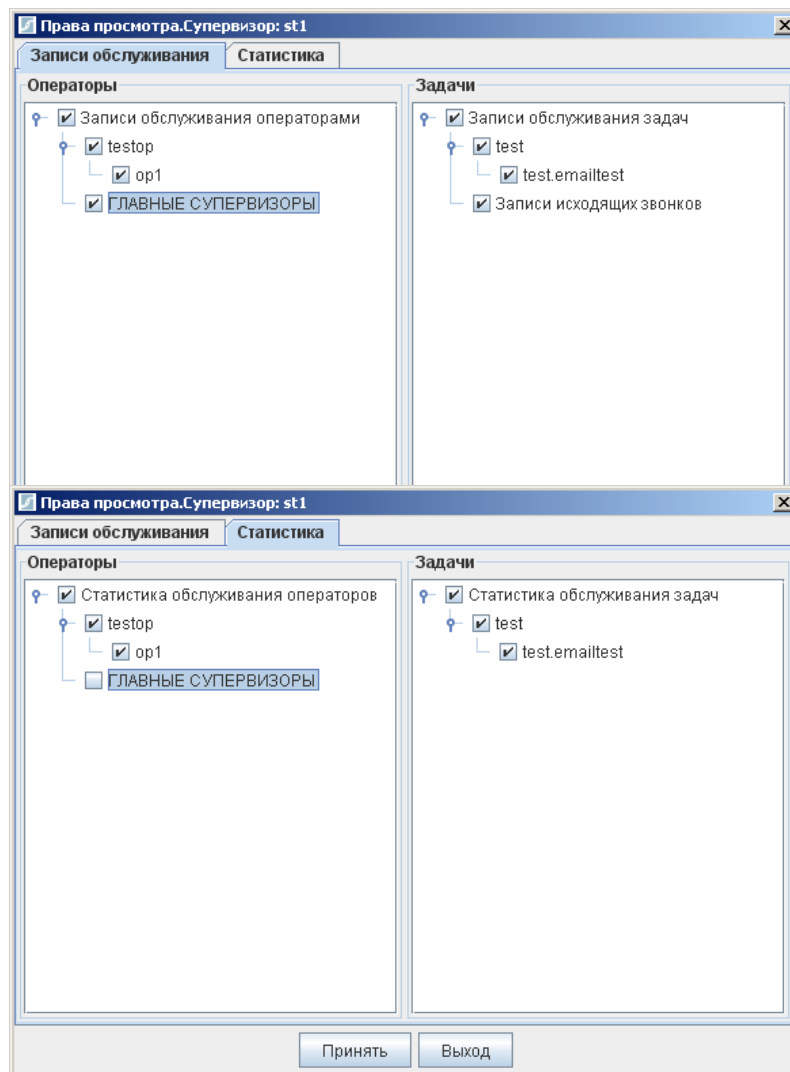
After adding all necessary information click «**Apply**».

Once you have created a user - you have to set the rights for viewing statistics and listen to recordings conversations. Click the left mouse button on the user account.



In right panel the rights of this account will appear. To open window of account's rights settings click «user's rights»

In the dialog box, select the tasks and the operators, whose statistics and records of conversations the user has the right to review.



OPERATORS AND SUPERVISORS

Operators of contact center perform customer service through a specialized application called "**Agent's workplace**." This application communicates with the Smile IPCC server via the TCP / IP network. The main functions of the workplace are the registration of the operator in the system, servicing calls, running forms and other applications, control of work. For voice communications software IP phone can be used, which is a part of the software of the workplace, or external telephone. The supervisor's workplace additionally includes tools for monitoring and control.

Operators grouped together in order to create the organizational structure. A group can include any number of operators and supervisors. Supervisor group "sees" only the operators of his group. In addition to supervisors of group there may be so-called "**Main Supervisors**" whose powers extend to all groups. The task list is assigned to each group of operators, which this group will serve. Within the group, for each task you can assign your own list of operators. The same task can be serviced by different groups with different priorities.

To create group of operators, click the right mouse button on «**Operators**» node and select «**create group of operators**».

Set the following settings in group settings:

Group name

Name of group of operators

Registration of agents by supervisor

this box is designed for operators working without a "Smile IPCC Agent" workplace (receiving calls on the telephone). Registration of such operators in the system is made from a supervisor workplace

Waiting for operator's response

the maximum time that is given to operators to accept an incoming call. If the operator did not have time to take the call, it automatically transferred into the state of pause

Group's setup button



button opens a panel of general settings related to the workplaces of the operators of this group (keyboard shortcuts, etc.)

Tasks

You must specify the tasks in settings for group operators, which will be served by this group. Select tasks from left box and click the «>» button to drag into right box. To set task service settings, mark it and click on «Properties»

OPERATOR GROUPS SETUP

Call settings

Remember ___ last incoming/outgoing numbers

Amount of phone numbers which are shown in operator's organizer.

Request for ending call service

By clicking on the button to end call service, a dialog box with confirmation will appear

Automatically respond the call

Operator workplace will automatically pick up the phone and connect with an operator during an incoming call and automatic outgoing dials.

Record automatically all outgoing calls

All outgoing calls of this group will be automatically recorded by system.

Hide indication of conversation recording

If this option is turned on, at the workplace of operator the indication of conversation recording won't be displayed.

Allow discussion in chat

Enabling this option will allow operators to communicate with each other in the inner chat of contact center.

Tasks shortcuts

This feature allows operators to call a fixed set of tasks by pressing a single key on the keyboard. To add "hotkey" do the following:

1. Click «**add**» in the upper right corner of dialog box.
2. Click the left mouse button on a new node "**Shortcut**" and press the button on the keyboard, pressing on which you want to call the task.
3. In the node "**Task**", select the task that will be launched by pressing the button, or enter a phone number to dial in the node "**Number**".
4. Click «**Apply**»

Other

Picture of group's supervisor

Icon, which differs supervisors of this group.

Picture of group's main supervisor

Icon, which differs supervisors of this group

Colour of group

The background color of icons of the operators and supervisors of this group

Allow to make schedules for operators of group

TASK SERVICE SETTINGS

Click «**Settings**» in group of operators settings dialog box to set service preferences for each task.

Обслуживание задачи: test.incA

Приоритет обслуживания задачи: 1 Занятых операторов не более: 100 %

Время на обслуживание задачи: 180 сек Среднее время обслуживания: 180 сек

Время на завершение задачи: 60 сек Среднее время завершения: 60 сек

Операторы

Не назначенные: op1, operator3

Назначенные:

Оператор	Приоритет
Supervisor1	1
operator2	1
operator4	1


Buttons: >, >>, <-, <<, Принять, Выход

In **task service settings** box you can set the following:

- Priority of task servicing** Priority of group, which considered when distributing the tasks (if the task can be serviced by several groups of operators)
- Time to service the call** Control time of service, which when exceeded is fixed on the supervisor's screen, issuing the appropriate signal
- Time to complete the task** Time to complete task (wrap-up), which when exceeded is fixed on the supervisor's screen, issuing the appropriate signal
- Occupied operators no more than** Percentage ratio of the maximum number of operators that can be tapped for service task to the total number of registered operators of the group. This option allows you to "reserve" part of operators to serve more important tasks.
- Average time service** Constantly calculated value that can be used to adjust the set control time. (Not editable)
- Average complete time** Constantly calculated value that can be used to adjust the set control time. (Not editable)
- Operators** With the buttons [>],[>>],[<],[<<] you can assign or cancel the appointment of operators on tasks service. In the list of designated operators the priority is set to each operator, which considered when distributing the task for the operator

To add operator or supervisor in the group, right-click on the name of the node and select the appropriate menu item.

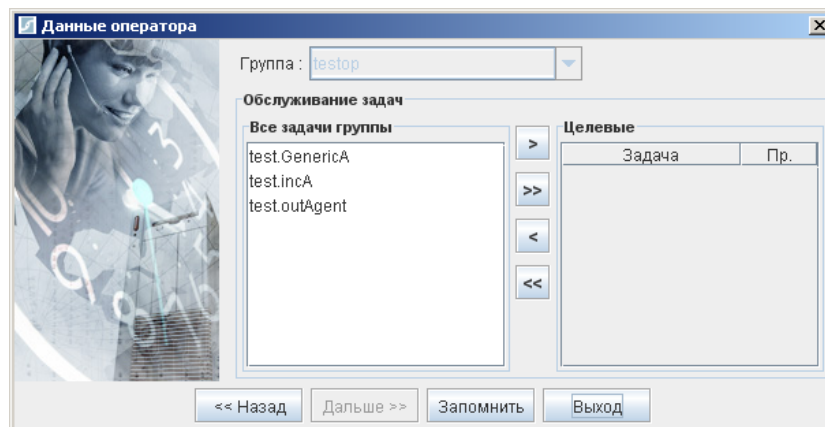
1. Set operator's preferences:

Name	Unique identifier of operator
Password	Set a password for login
Information	General data (this box contains only informative data)
Call routing	Field contains information for routing a call to the operator's workplace. If the call comes to operator's computer, the value of this field must match the ID of the operator. If the call should be directed to a telephone, this field is prescribed a phone number. The call to this number is performed in accordance with the table routing server
Greeting	Audio file, containing operator's personal
Operator's workplace setup button 	Opens a window, which contains personal settings of operator's workplace

2. After setting all preferences click «Next»

3. Select a category to which a given operator belongs. To do this, drag the appropriate categories from a box of "All" in the "Target» box
4. Click «Next»

5. Select the tasks that will be serviced by the given operator by dragging them from the box "**All tasks of the group**" in the "**Target**" box



6. Click «**Apply**»

OPERATOR'S WORKPLACE SETUP

Quick task launch

This feature allows operators to launch a fixed set of tasks by pressing a single button. To add «hotkey» do the following:

1. Click «**Add**» in the right upper corner in dialog box
2. Click the left mouse button on a new node "**Shortcut**" and press the button on the keyboard, pressing on which you want to call the task
3. In the "**Task**" node, select the task that will be launched by pressing a button, or enter a phone number to dial in the "**Number**" node
4. Click «**Apply**»

Other

Picture

Operator's personal icon

Colour

Background colour of operator's icon

Use a private connection

Allows the operator to use a private connection to the database